



PegaWorld*iN*spire

JUNE 9-11, 2024 | LAS VEGAS

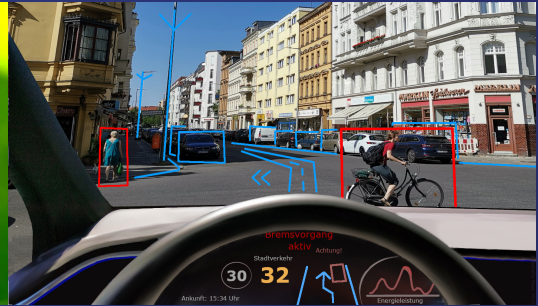
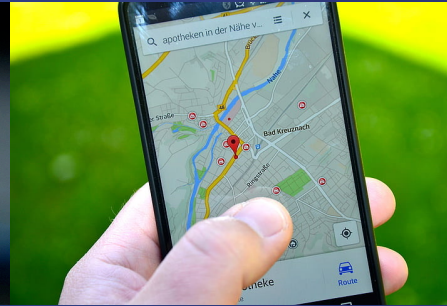
# Reach for the Stars: Unleash Innovative, Exceptional and Accessible Experiences with Pega Constellation Today!

Caroline Power  
Sam Alexander  
Shaun Wortis

Pegasystems

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Software-driven

2004

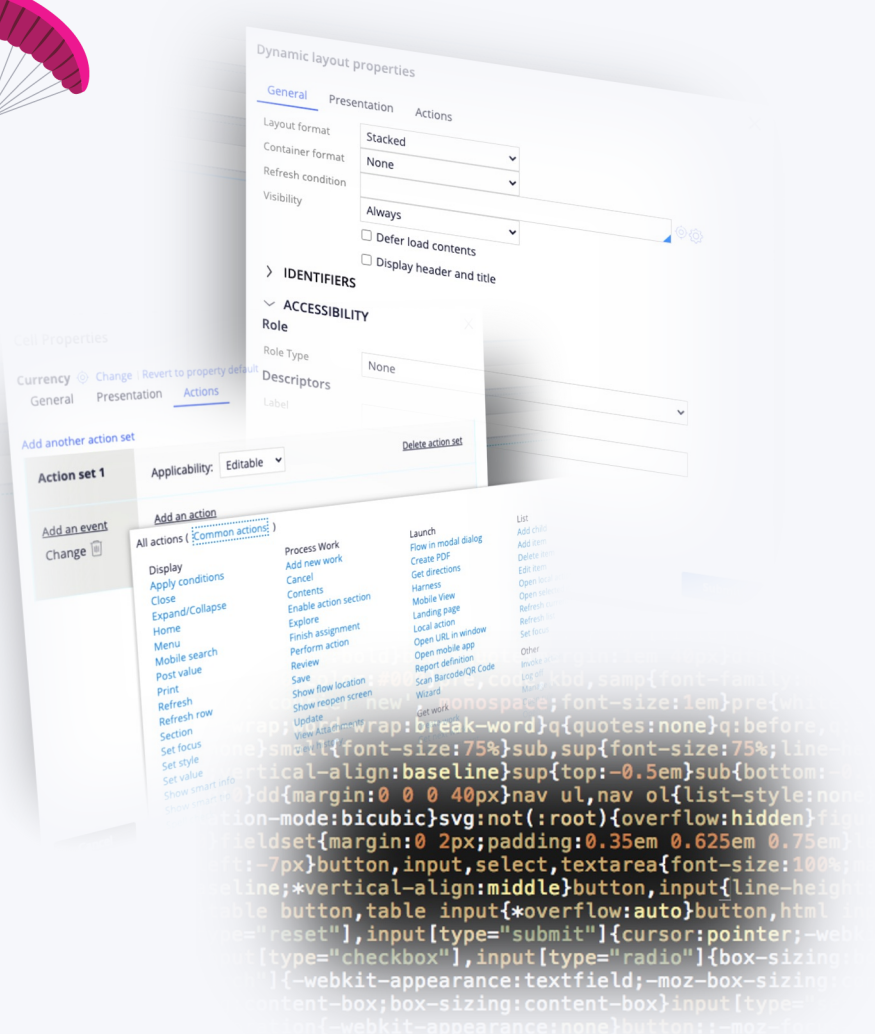
2004



We noticed and you told us

# User Interface (UI) development was disproportionately costly.

- Required deep skills in esoteric Pega UI constructs and front-end technologies.
- Required long dev cycles for UI design and development.
- Procedural business logic was woven into the UI for many channels.

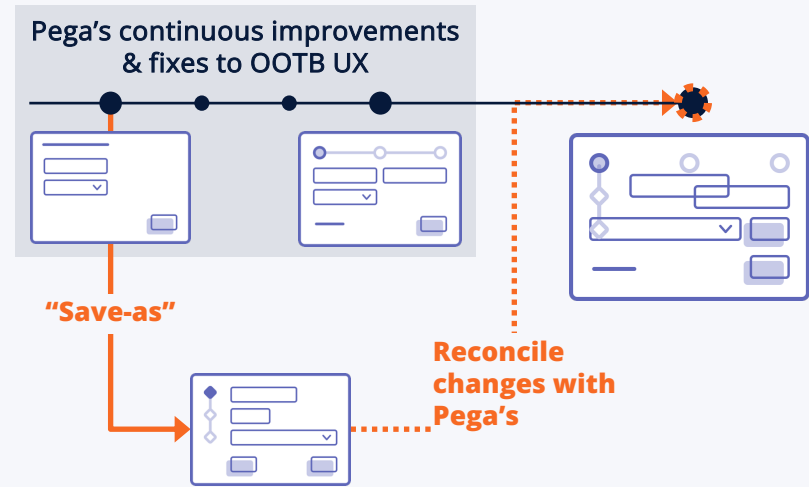




*We noticed and you told us*

# UI upgrades were very hard.

- "Save-as" meant reconciling with Pega's critical bug fixes and enhancements.
- Other Incorporated front-end technologies (CSS, JavaScript, etc.) broke apps.



We noticed and you told us

# Accessibility compliance is critical.

- Required deep skills in Accessibility.
- Lawsuits increasing.



A screenshot of a software interface showing a 'Dynamic layout properties' dialog box. The 'General' tab is selected. Under the 'ACCESSIBILITY' section, the 'Role' dropdown menu is open, showing options: Application (checked), Banner, Complementary (highlighted by a mouse cursor), Contentinfo, Form, Main, and Navigation. The 'Descriptors' section is also visible below the role menu.

A screenshot of a Forbes article. The title is 'Website Accessibility Lawsuits Rising Exponentially In 2023 According To Latest Data'. The author is Gus Alexiou, a contributor who writes about accessibility, inclusion, and social justice. The article is dated June 30, 2023, at 07:20am EDT. Below the text is a photograph of a gavel resting on a laptop keyboard.

<https://www.forbes.com/sites/gusalexiou/2023/06/30/website-accessibility-lawsuits-rising-exponentially-in-2023-according-to-latest-data>



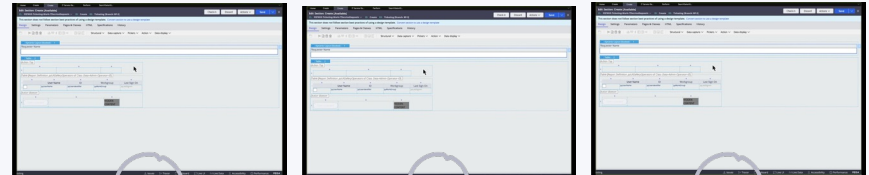
*We noticed and you told us*

# Duplicating UI is costly.

- Increased
  - development time.
  - rule maintenance.
  - risk of introducing bugs.
- Inconsistent user interface.



**Same fundamental pattern implemented in three different ways.**



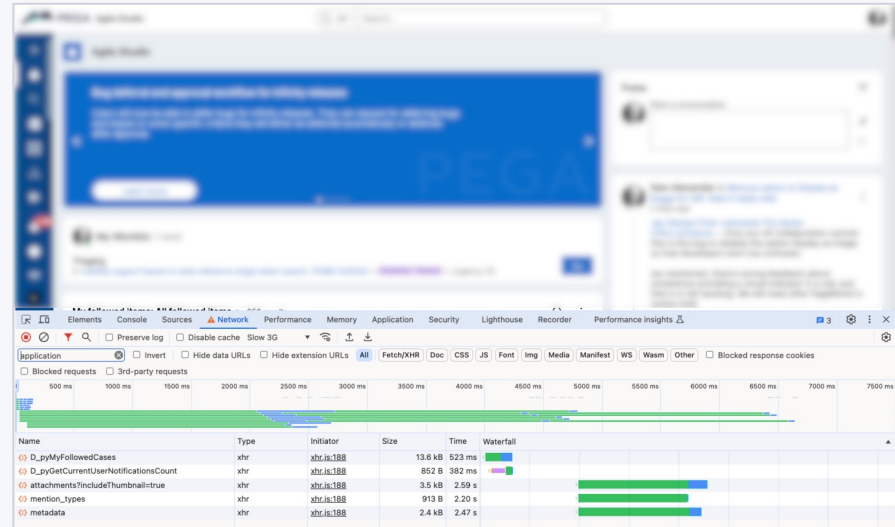




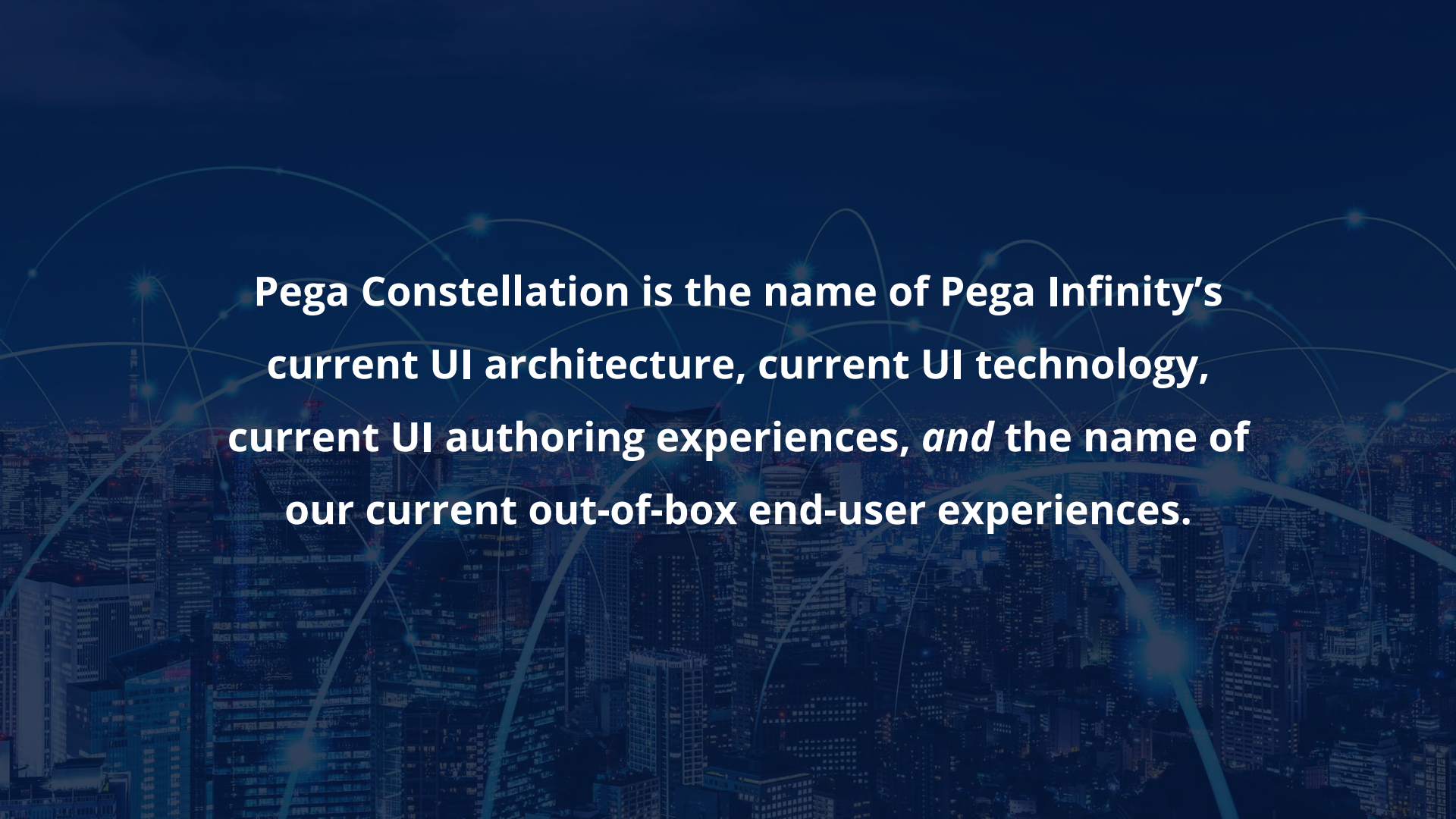
We noticed and you told us

# Scalability and performance is critical.

- Traditional stateful architecture made it difficult to
  - Scale up and down nodes in a cloud environment
  - Make concurrent requests to server



- 
- ✓ **Business logic should be out of UI. Center-Out!**
  - ✓ **REST-API and standards-based open architecture**
  - ✓ **“Single-page-app” technology**
  - ✓ **A complete UX system, out-of-the-box**



**Pega Constellation is the name of Pega Infinity's current UI architecture, current UI technology, current UI authoring experiences, *and* the name of our current out-of-box end-user experiences.**



# **A complete UX system, out-of-the-box.**

- ✓ **Delivered to the browser**
- ✓ **Accelerates end-user productivity**
- ✓ **Designed around how Pega uniquely delivers workflow**
- ✓ **Puts accessibility first**
- ✓ **A complete UX system to minimize build time**
- ✓ **An architecture which allows you to bring your own UI**





# Case Designer

## Build work parties



Add payor party



Add payor bank party

## Load account details



Load account details

## Load transaction details



Load transaction details

## Supplemental info



Collect supplemental inf...

## Create payment exception...



Create Visa payment exc...



Add related exception w...

## Duplicates flow



Has duplicate visa paym...



Review duplicates



Do the duplicates resolv...



Route to resolve stage

## Customer interview



Has unresolved paymen...



Customer interview



Process customer intervi...



All exception resolved?



Route to a resolve stage



Resolve claim

## Refunds and reversals



Skip merchant credits



Refunds and reversals

## Resolve



Determine resolution st...



Resolve immediately?

## Send notification



Set corr data



Send corr



Send claim notification

## Delete open assignments i...



Delete open assignments

## Additional information



Review additional transa...



Process additional info



Do the additional inform...



Route to resolve stage

## Refunds and reversals



Are refunds or credits av...



Review refunds, reversal...



Do the credits resolve cl...



Route to resolve stage

## Low value write-off

## Provisional credit



Is claim eligible for provi...



Process automatic provi...



Is PC Given ?



Send provisional credit ...

## Fraud investigation



Check status of child c...



Has open exception cases



Fraud investigation



Process Fraud Investigat...

## Fraud recovery

# "Spaghetti Section Monsters"

The image displays a complex web application interface, likely a design tool or a highly customized user interface, characterized by a dense and overlapping structure of sections and panels, earning it the title "Spaghetti Section Monsters".

The interface is divided into several main areas:

- Left Sidebar (DEV STUDIO):** Contains navigation options such as "Records", "Application Definition", "Data Model", "Decision", "Generative AI", "Integration-Connectors", "Integration-Mapping", "Integration-Resources", "Integration-Services", "Organization", "Process", "Reports", "Security", "Survey", "SysAdmin", "Technical", and "User Interface".
- Top Navigation:** Includes "Application: Shaun App", "Configure", "Launch Portal", and "Create".
- Main Content Area:** Displays a complex layout with multiple overlapping sections, including:
  - Section: pyPortalNav [Available]:** Contains a message: "To convert this section to use a design template, it must be in an unlocked ruleset. Convert section to use a design template".
  - Section: Case Content [Available, Extension]:** Contains a message: "To convert this section to use a design template, it must be in an unlocked ruleset. Convert section to use a design template".
  - Section: Grid No Results Message [Available]:** Contains a message: "To convert this section to use a design template, it must be in an unlocked ruleset. Convert section to use a design template".
  - Section: pyMyCasesContainer [Available, Extension]:** Contains a message: "To convert this section to use a design template, it must be in an unlocked ruleset. Convert section to use a design template".
  - Section: Feed [Available]:** Contains a message: "This section has some inline styles added to layouts or cells. Remove inline style".
  - Section: Portal Navigation [Final]:** Contains a message: "This record has 1 severe or moderate warning and 1 info warning".
- Right Sidebar:** Contains a "MISC" section with a "Menu" button.

The interface is heavily cluttered with overlapping panels, buttons, and text, illustrating the "spaghetti" nature of the design.

# Constellation Structure

The screenshot displays the APP STUDIO interface for a 'Car' case type. The main content area shows a user profile for Peggy Rogers (ID: C-2593) with the following details:

- Priority:** 10
- Urgency:** 30
- Status:** IN PROGRESS
- Account:** 1AS-D109304
- Account type:** Gold

The profile is divided into sections: **Personal details** (First name: Peggy, Last name: Rogers, Phone number: (555) 276-1909), **Organization** (Name: U+ Loans, Phone number: (555) 262-3444), and **Account details** (Married: Yes, Children: 2). A workflow bar at the top indicates the process is in the 'Doing' stage.

The right-hand panel, titled 'Full Page View', allows for configuration of the user profile's layout. It includes sections for:

- Heading:** Name (dropdown)
- Subheading:** Case ID (dropdown)
- Highlighted fields:** Priority (Integer), Urgency (Integer)
- Summary:** Status (Text), Account (Text), Account type (Text)
- Tabs:** Details (Tab), Pulse (Tab), History (Tab)
- Utilities:** Attachments (Widget), Followers (Widget)

Each field in the configuration panel includes a settings gear icon and a trash can icon for removal. The interface also features a top navigation bar with 'APP STUDIO', 'Application: U+ Bank', and 'DEVELOPMENT' mode, along with 'Preview', 'Save and run', and 'Save' buttons. A left sidebar contains navigation options for Overview, Case Types, Data, Channels, Explore Data, Users, and Settings.



# Constellation Structure



RETAIL BANKING • BP-1004

## Tech Entrepreneur Loan



### What Case Types do you want to automate? ⓘ

[↑ Create from BPMN](#) [+ Add a Case Type](#)



#### Loan Application CASE TYPE

This case type represents the initial application submission by a tech entrepreneur for a small business loan. It includes the collection of basic information about the applicant, such as personal details, business details, and loan requiremen...



#### Credit Assessment CASE TYPE

This case type represents the credit assessment process for a small business loan application. It involves evaluating the creditworthiness of the applicant by analyzing their credit history, financial statements, and other relevant information.



#### Business Plan Review CASE TYPE

This case type represents the business plan review process for a small business loan application. It includes assessing the viability and potential of the tech entrepreneur's business plan, analyzing market conditions, competition, and gro...



#### Fraud Escalation CASE TYPE

This case type is for escalating applications that have been flagged for potential fraud, ensuring that the customer receives a fair review and that the Bankley Loans is protected from potentially fraudulent applications.

[+ Generate More](#)

PEGA Tech Entrepreneur Loan

### Loan Application

C-2593

Priority	Decision
10	<b>PENDING</b>
Application ID	SBA-1056
Review Status	<b>UNDER REVIEW</b>
Customer	Bankly Loans
Business Stage	Pre-launch
Funding Required	\$500,000
Account Manager	Peggy Rogers

Details

Pulse

History

Back

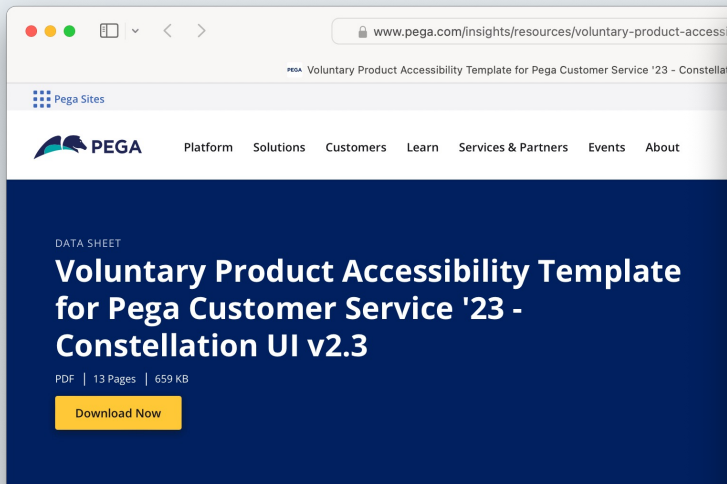


Preview my app

Save and Close

Next

# Constellation Front-end



www.pegacom/insights/resources/voluntary-product-accessibility-template-for-pegacom-customer-service-23-constellation-ui-v23

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DATA SHEET

## Voluntary Product Accessibility Template for Pega Customer Service '23 - Constellation UI v2.3

PDF | 13 Pages | 659 KB

Download Now

This Voluntary Product Accessibility Template, or VPAT™, report represents the Pega Customer Service '23 - Constellation UI v23.1 conformance to WCAG 2.1 AA guidelines published by the World Wide Web Consortium (W3C). This report details the criteria evaluated, the conformance level, and explanations for the rating provided.

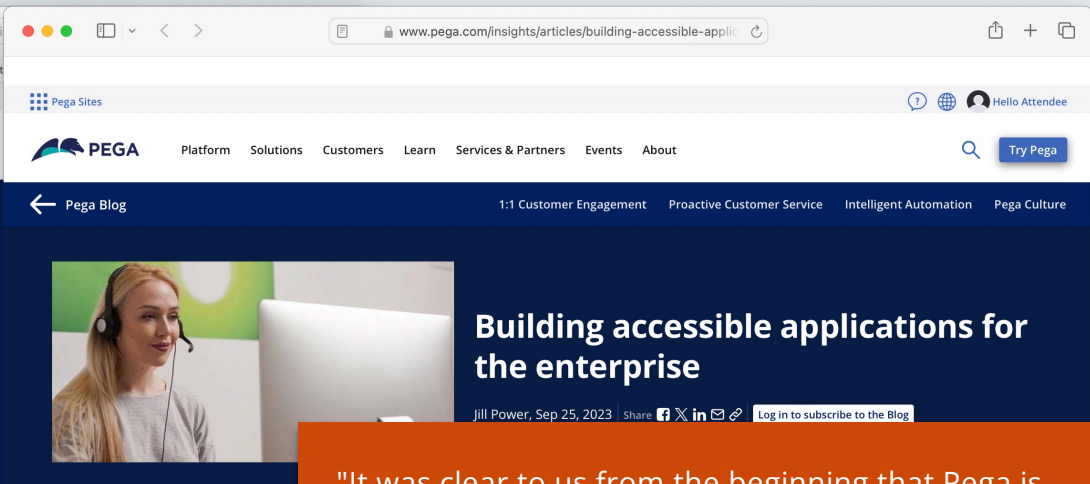
Pega Customer Service '23-Constellation fully supports the majority of criteria and is partially conformant with a few. Partial conformance means that some functionality of the product does not meet the criterion outlined. These areas are detailed in the explanation column and are planned in our upcoming roadmap.

**TAGS**

Product Area: Customer Service | Topic: Compliance | Topic: UX and Design

**Related Resources**

VIDEO  
[Intro to Pega Customer Service: Service, Simplified >](#)



www.pegacom/insights/articles/building-accessible-applications-for-the-enterprise

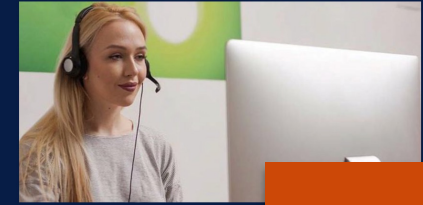
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1:1 Customer Engagement Proactive Customer Service Intelligent Automation Pega Culture



## Building accessible applications for the enterprise

Jill Power, Sep 25, 2023 | Share | Facebook | LinkedIn | Email | Log in to subscribe to the Blog

If there is one resilient and technologies quickly to a globally, i.e., in person we people with workforce. A must be asked be efficient in

At Pega, our to address the develop feat could be use

"To accomplish Founder of L to delivering people of all new features prod feat to

"It was clear to us from the beginning that Pega is committed to delivering exceptional experiences for all users, and ultimately to creating more equitable workplaces for people of all abilities. By embedding accessibility into its Constellation design system, Pega is ensuring that new features incorporate accessibility standards by default and is setting a consistent standard for inclusive workforce solutions."

—Tim Springer, CEO



# Constellation Front-end

**Sid Garner** Customer

**Churn risk**  
**Low**

**Interaction goal**  
**Resolve claim**

Customer value: Platinum  
Call back: 1-611-961-0914  
Email: [sid@lovelymercedes.com](mailto:sid@lovelymercedes.com)  
Address: 250 Marina Drive, Santa Barbara, CA 93190

Open claims: 1  
Last claim date: Jun 10, 2024  
Last interaction: Inbound call - Feb 19, 2023  
Self-service customer: Yes  
Primary language: English

**Policies & Contracts** 3

Customer

Customer activity

Recent offers

Suggested actions 1

→ Add driver  
Started on Web self-service

I am here to help you report your auto accident. I need to work through a few questions with you to file the claim.

**Cases** Wrap up + Add task

Personal auto claim

**Personal auto claim**

Date of loss \*  
06/05/2024 07:33:40 AM

Policy \*  
Personal automobile -7852

Vehicle involved \*  
1965 Mercedes 220 SE

Is the vehicle driveable \*  
 Yes  No

**Accident location**

Country \*  
United states

Address line 1 \*  
250 Marina Drive

City \*  
Santa Barbara

Address line 2  
Postal code \*  
93190

Caller's role in loss  
Claimant

Submit

**Policies and contracts**

Selected policy  
Personal Automobile - 7852 (Policyholder)

Policy number  
**PA9087527852**

Next payment amount  
**\$155.65**

Next payment date  
**June 25, 2024**

**Pega GenAI Knowledge Buddy™**

Suggested Ask Buddy

Ask any question here...

Clear Ask

**Knowledge articles**

Suggested 1 Search

Understanding Comprehensive Coverage

Encounters between vehicles and animals on roads can lead to significant damage and potential danger for both drivers and animals...

Auto coverages • Mar 15, 2024 • (127) (5)

**Attachments** 3

Damaged front seat  
Photo

Back seat  
Photo

**Agent ext 1254**

Busy 45:30

**Sid Garner** 1:27 / 5:00

# Complete UX System: "Search & Select"

Progress: ✓ Create > In progress > Completed

**KT** Select customer

Search for\*

Consumer  Business

Search

First name: Terry  
Last name: Mason  
SSN:   
Reset Search

Select

Search results ▾ 0 results

	First name	Last name	State	Status
<input type="radio"/>	Terry	Mason	CA	ACTIVE
<input type="radio"/>	Terry	Mason	MA	ACTIVE
<input type="radio"/>	Terry	Mason	NY	ACTIVE
<input type="radio"/>	Terry	Mason	TX	ACTIVE

Cancel Submit

Final output is a single value (e.g., an ID)  
PegaWorldInspire

# Complete UX System: "Search & Select"

## Runtime experience

Progress: ✓ Create > In progress > Completed

**KT Select customer**

Search for \*

Consumer  Business

First name:  Last name:

SSN:

[Reset](#) [Search](#)

**Customers** ▾ 0 results

	First name	Last name	State	Status
<input type="radio"/>	Terry	Mason	CA	ACTIVE
<input type="radio"/>	Terry	Mason	MA	ACTIVE
<input type="radio"/>	Terry	Mason	NY	ACTIVE
<input type="radio"/>	Terry	Mason	TX	ACTIVE

[Cancel](#) [Submit](#)

## Authoring experience

**Edit Search Category: CSR Consumer search**

Template: Search & select

Name \*

Data page

> Parameter

**"Search" fields**

- First name, ... Search by group + ⚙️ 🗑️
  - First name Text (single line) ⚙️ 🗑️
  - Last name Text (single line) ⚙️ 🗑️
  - SSN Text (single line) ⚙️ 🗑️

+ Add

**Search result columns**

- First name Text (single line) ⚙️ 🗑️
- Last name Text (single line) ⚙️ 🗑️
- State Text (single line) ⚙️ 🗑️
- Status Text (single line) ⚙️ 🗑️

# Complete UX System: Promoted Filters & Action



Plans

Plan name

Insurance line

Medical



Market segment

All



Line of business

Commer

[Clear all filters](#)

Effective date

MM / DD / YYYY



MM / DD / YYYY



Datatype: Default ▾ 22 results

Plan name	Insurance line	Market segment	Line of business
Medical Connect Basic	Medical	Small Group	Commercial
Medical 100% HMO	Medical	Small Group	Commercial
Medical Bronze 500	Medical	Small Group	Commercial
Preferred Gold	Medical	Small Group	Commercial
Preferred HMO	Medical	Small Group	Commercial
Qualified PPO	Medical	Small Group	Commercial
True Max	Medical	Large Group	Commercial
True Preferred	Medical	Large Group	Commercial
Qualified 80%	Medical	Small Group	Commercial
Qualified 90%	Medical	Small Group	Commercial



Plans

Created date

06/01/2024



Market segment

Small Group



[Clear all filters](#)



Peggy Rogers

C-2593



[Add activity](#)

[Change stage](#)

Priority

10

Urgency

30

Status

**IN PROGRESS**

Phone number

(617) 276-1909

Email

[design.site@pega.com](mailto:design.site@pega.com)

Address

1 Rogers St. Cambridge, MA

Account

1AS-D109304

Account type

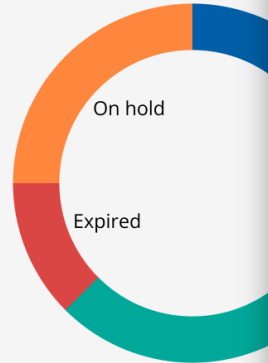
Gold

Updated

[Peggy Rogers](#) 2d ago

Created

[Bill Blass](#) 1y ago



## Runtime experiences

Sep 15, 2024

# Complete UX System: Promoted Filters & Action

**Plans**

Plan name Insurance line Market segment Line of business Effective date

Medical Medical All Commercial Clear all filters

MM/DD/YYYY MM/DD/YYYY

Datatype: Default 22 results

Plan name	Insurance line	Market segment	Line of business	Effective date
Medical Connect Basic	Medical	Small Group	Commercial	Sep 15, 2024
Medical 100% HMO	Medical	Small Group	Commercial	Sep 15, 2024
Medical Bronze 500	Medical	Small Group	Commercial	Aug 1, 2024
Preferred Gold	Medical	Small Group	Commercial	Sep 15, 2024
Preferred HMO	Medical	Small Group	Commercial	Sep 15, 2024
Qualified PPO	Medical	Small Group	Commercial	Sep 1, 2024
True Max	Medical	Large Group	Commercial	Aug 15, 2024

## End user filtering

Promoted filters

## Promoted filters


- Plan name Text (single line)
- Insurance line Picklist
- Market segment Picklist
- Line of business Picklist
- Effective date range Date

+ Add

**Plans**

Created date Market segment Clear all filters

06/01/2024 Small Group



Not started In progress On hold Expired

## Authoring experience

### Promoted filters

- Created date
- Market segment

**Peggy Rogers**  
C-2593

Add activity Change stage

Priority 10 Urgency 30

Status **IN PROGRESS**

Phone number (617) 276-1909

Email [design.site@pega.com](mailto:design.site@pega.com)

Address 1 Rogers St. Cambridge, MA

Account 1AS-D109304

Account type Gold

Updated Peggy Rogers 2d ago

Created Bill Blass 1y ago

## Options

- Show Case icon
- Show Case Life Cycle
- Show promoted Action

# Complete UX System: Forms

PEGA Quick Quote

Q All Search...

PW

**Auto quote for Owen Smith**  
A-2593

Priority **10** Urgency **30**

Status **IN PROGRESS**

Phone number **(617) 276-1909**

Email **owen.smith@pega.com**

Address **100 Main St. Cambridge, MA**

Account **1AS-D109304**

Account type **Gold**

Updated **Peggy Wyman** 2d ago

Created **Peggy Wyman** 1y ago

Pulse

**Details**

Opportunities

History

**Create** **Quote** **Resolve**

**Collect information**  
Task in A-2593 • Due in 2 days • Urgency 45

Group rate

Applicant age \*  Spouse age \*

State \*  Premium frequency

Type  Class

Salary  Discount type

**Details**

Personal details		Address	
First name	Owen	Street address	100 Main St.
Last name	Smith	City	Cambridge
Phone number	(617) 276-1909	State	MA
Email	owen.smith@pega.com		
Age	--		
Marital status	Married		

**Utilities**

**Attachments** 4

**Summary of benefits**  
Contract • Riley Gneiss

**Insurance plan**  
Reference • Eva Prosper

**FAQ**  
Link • Jodie Hennessy

[View all](#)

**Followers** 1.2K

**NS** Nathan Swanson  
Manager

**GS** Glenn Simpson  
Engineer

**Kg** Ralph Green  
HR Director

[View all](#)



# Complete UX System: Forms (Runtime Experiences)

## Default ("one and done")

✓ Create    Doing

KT Collect customer information

First name \*    Last name \*

Account type \*  
Select... ▾

Contact number \*  
+1 ▾ ( ) -

Will this customer need an account transfer \*  
 Yes    No

Cancel

## Conditional ("screen to screen")

✓ Create    Doing

KT Capture client details

Step 2 - Add notes

Client notes \*

Client value code \*  
Select... ▾

Client interview deadline \*  
MM / DD / YYYY

Client contact number \*  
+1 ▾ ( ) -

Cancel    Save for later

## Hierarchical long-form

✓ Create    Doing    To do

KT Capture KYC details

Questions    Associated parties    Account selection    Account details

Internal audit    Client

Initial proposed transactions

Transfer of Account? \*  
 Yes    No

Transfer of Seg Funds? \*  
 Yes    No

Transfer of Securities? \*  
 Yes    No

Transfer of Funds? \*  
 Yes    No

Action \*  
 Buy    Sell    N/A

IA code \*  
Select... ▾

Cancel    Submit    Save for later

# Complete UX System: "Hierarchical Long Form" Authoring

## Runtime experience

Progress: Create > Doing > To do

KT Capture KYC details

**Questions** | Associated parties | Account selection | Account details

**Internal audit** | Client

**Initial proposed transactions**

Transfer of Account? \*  
 Yes  No

Transfer of Seg Funds? \*  
 Yes  No

Transfer of Securities? \*  
 Yes  No

Transfer of Funds? \*  
 Yes  No

Action \*  
 Buy  Sell  N/A

IA code \*  
Select... [v]

Cancel [Submit] Save for later

Select... [v]

Cancel [Submit]

## Authoring experience

Edit view: Capture KYC details ⓘ

Template: Hierarchical form [Edit]

View label \*  
Capture KYC details

Instructions \*  
None [v]

**Form groups**

- Questions [Settings] [Trash]
- Associated parties [Settings] [Trash]
- Account selection [Settings] [Trash]
- Account details [Settings] [Trash]

+ Add

- Client type [Settings] [Trash]
- Client's overall risk tolerance Picklist [Settings] [Trash]
- Client's overall risk tolerance Picklist [Settings] [Trash]

Name  
Metadata • Metadata • Metadata 65

Followers 1.2K +

Success 3

- Field label: Success message
- Field label: Success message
- Field label: Success message

Data could not be loaded

Cancel

Tooltip: Lorem ipsum dolor

PR Card header 8 results

Column header	Column header	Column header
No items		

Cancel

Increment

- +

Document.pdf

Upload files \*

Drag and drop or choose files

Radio group \*

Option  Option  Option

Helper text

Datatype: Default 22 results Search...

Text input

PENDING

SUCCESS

URGENT

WARN

Discard unsaved changes?

Your changes will not be saved.

Go back Save and close Discard

Multiselect

Selection x Selection x

Multiselect

HH:MM:SS AM

Peggy Rogers C-2593

Date and time

06/15/2024 07:33:40 AM

Created {Case label} (CT-###)

Type of work

- Unresolved work
- Work entered last by me
- Work last updated by me

Pulse

Start a conversation


UN

99+

# Constellation's Extensibility: Bring Your Own UX System.

## Earn more with SavingsPLUS

Enjoy the highest yield in the country with a U-Bank SavingsPLUS account. This product is ideal for those who want to earn more with their money.



**LIMITED TIME OFFER**  
For a limited time only, bundle your savings account to earn 25,000 bonus points on a CB Credit Card PLUS

[Apply Now](#)


### Simplify your banking and save

SavingsPLUS	Flex Checking	CB Credit Card PLUS
A complete medical coverage plan, to keep you protected in all situations	A complete medical coverage plan, to keep you protected in all situations	A complete medical coverage plan, to keep you protected in all situations
<b>20% APR</b>	<b>No ATM fees</b>	<b>Earn 5% cash back</b>

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Unibank

### Visão Geral

Seus Cartões

VISA 1204 5 11025 ****1345	18.777.34 5 04233 ****6284	VISA
----------------------------	----------------------------	------

**Saúdo em conta corrente**  
Essa mês: **18.031.211,98**



**Transações recentes**

Data	Descrição	Detalhes
01/12/2023	Transferência de pontos de viagem para programa Sênior	<a href="#">Detalhes</a>
01/12/2023	Atribuição da data de vencimento da fatura do cartão de crédito	<a href="#">Detalhes</a>
12/11/2023	Transferência para conta poupança	<a href="#">Detalhes</a>
12/09/2023	Cobrança de débito automático para o cartão giro! (real: 700)	<a href="#">Detalhes</a>

**Atalhos**  
[Requisitar um serviço](#)  
[Realizar um pagamento](#)  
[Atualizar fatura](#)

Sobre nós - Anúncios - Privacidade - Configurações - Português

An official website of the United States government. [Here's how you know](#)

## Local governance

Secondary link | Another secondary link

Current section - Section - Simple link

### Hero callout: Bring attention to a project priority

Support the callout with some short explanatory text. You don't need more than a couple of sentences.

[Call to action](#)

### A tagline highlights your approach

The tagline should inspire confidence and interest, focusing on the value that your overall approach offers to your audience. Use a heading typeface and keep your tagline to just a few words, and don't confuse or mystify.

Use the right side of the grid to explain the tagline a bit more. What are your goals? How do you do your work? Write in the present tense, and stay brief here. People who are interested can find details on internal pages.

## We're here to get you unstuck, so you can keep exploring.

[Schedule Service Appointment](#) [Download User's Manual](#) [Troubleshoot Infotainment Issue](#)

### Community Knowledge Base

How can we help?

- Plans
- Accounts
- Troubleshooting
- Billing



# **A complete UX system, out-of-the-box.**

- ✓ Accelerates end-user productivity
- ✓ Designed around how Pega uniquely delivers workflow
- ✓ Puts accessibility first
- ✓ Radically minimizing build time
- ✓ Adds a new semantic structure to UI-building
- ✓ An architecture which allows you to bring your own UI

~~Build for adopting~~  
change...



# Pega Infinity Constellation Prioritizes Great UX

Focus on outcomes, invest in elaborate UX when it counts



## Shortest **time-to-value**

-  Accessible
-  Extensible
-  Maintainable
-  Performant
-  Responsive
-  Secure
-  Trainable



## Infinite **extensibility**

Your design system.

Your customer portal.

***Your differentiators.***

# Choosing Constellation

General guidance for adopters

## 1 New workflow?

Build with Infinity Constellation.

2

## Multi-channel, front-to-back office, or self-service workflow?

Experience the speed of configuring Pega's Work and Self-service Portals combined with the flexibility to bringing your own screens for untrained users - all connected with one workflow.

## 3 "Hidden" value drivers?

Do I need to uplift current UI for regulatory? Security? Or other value-based "invisible" requirements best met with a modern architecture?





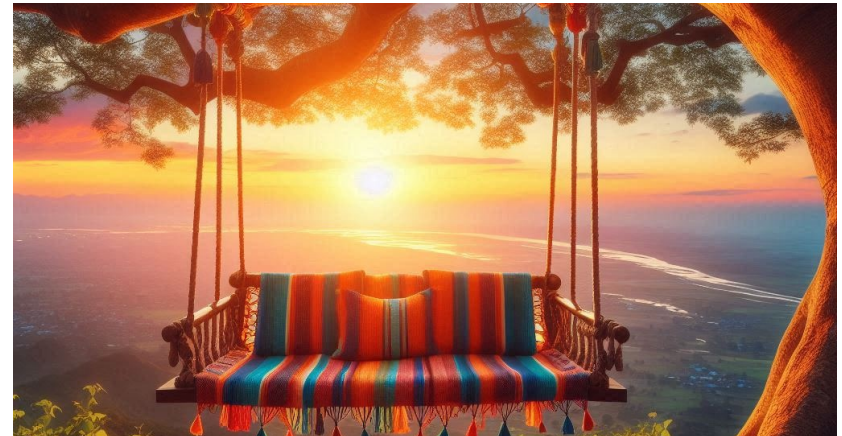
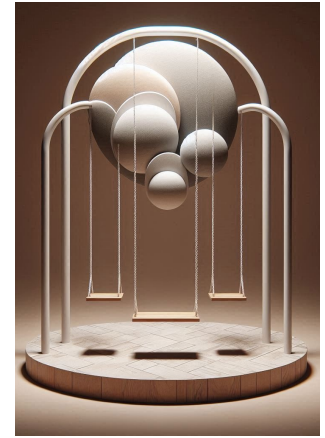
# A Metaphor for Change

1. Directions = leadership
2. Preparation = enablement and training
3. Watch for potholes = risk mitigation
4. Accelerate = rapid development & release



# Focus on Value and Outcomes

- Keep a “so that...” mindset
- Avoid solutioning in requirements
- Reserve points for training
- Discuss heavy customizations & extensions with stakeholders
- Use a decision matrix for consistency
- Avoid “pausing everything” to adopt
- Start with “Hello world”



# Skills for Building

Shortest **time-to-value**

Infinite **extensibility**

## 2. Pega's Digital Experience API

Awareness and familiarity with the Digital experience API is core to the Pega architects learning journey.

## 1. Pega Constellation UX system

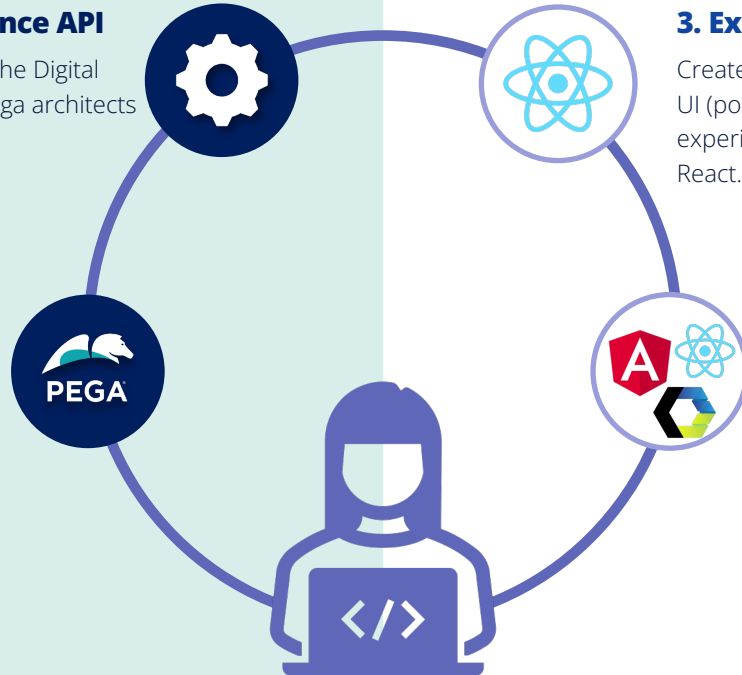
Baseline Business, System, Senior System, or Lead System Architect skills are the foundation skillsets needed to be effective on an Infinity implementation.

## 3. Extend Constellation's UI

Create extensions to Pega's out-of-the-box UI (portals, web embed, or mobile experiences) by building DX Components in React.

## 4. SDKs for React, Angular & Web Components

Bring back-office workflows to your existing portals. Connect your business top-to-bottom, Center-out™.



# Beyond Infinity

DX Components are powerful, wield them wisely

## Aware

Implementation  
team

## Functional

Pega Architects

## Advanced

Pega Architects

## Expert

Pega Architects  
solo or paired



# Adoption Strategies

Do you find your situation in one of these?



S

New workflows and applications

is appropriate for...

Adding new Case types and applications with the new architecture.



M

Modify select functionality

is appropriate for...

Modernizing case types or whole applications identified as high-value opportunities or quick wins.



∞

Infinity factor

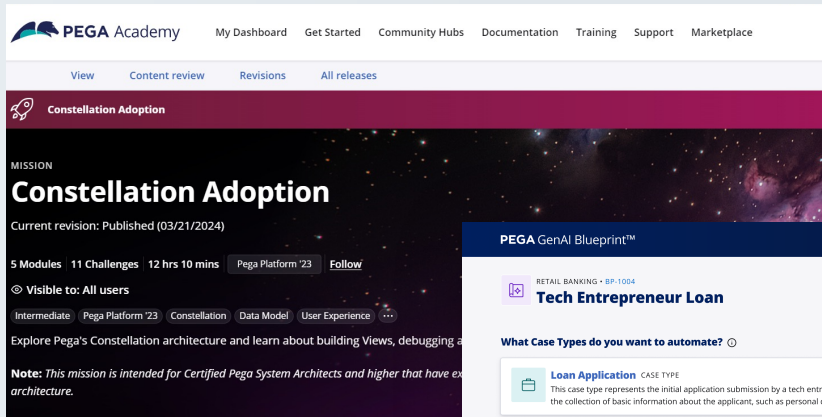
is appropriate for...

Clients with strategic applications, industry foundations, volume-based requirements or another situational consideration.

**None of these your situation?**

Tell us about your situation, specific concerns, and constraints.

# Begin YOUR JOURNEY *today!*



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View Content review Revisions All releases

## Constellation Adoption

MISSION

### Constellation Adoption

Current revision: Published (03/21/2024)

5 Modules 11 Challenges 12 hrs 10 mins Pega Platform '23 Follow

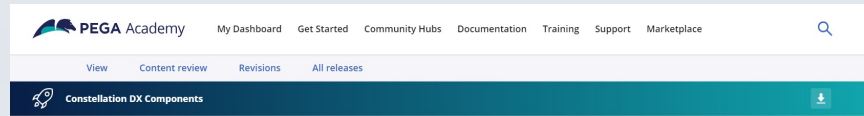
Visible to: All users

Intermediate Pega Platform '23 Constellation Data Model User Experience ...

Explore Pega's Constellation architecture and learn about building Views, debugging a...

**Note:** This mission is intended for Certified Pega System Architects and higher that have ex...

architecture.



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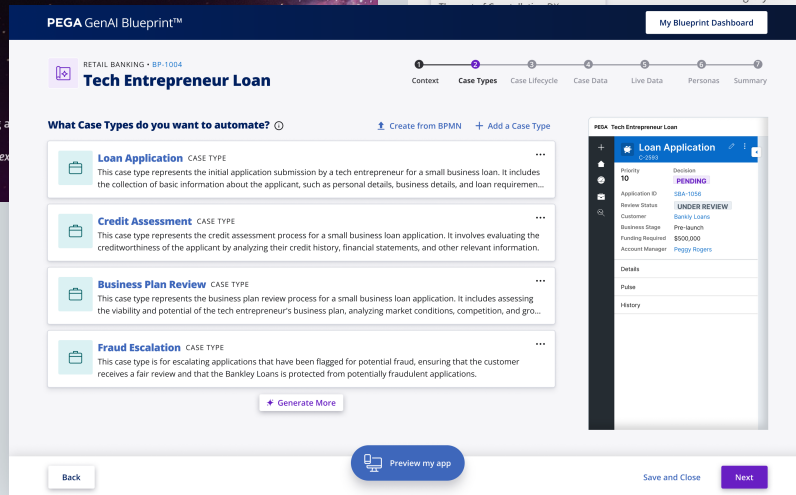
## Constellation DX Components

### Constellation DX Components

Constellation DX components

## Constellation DX Components

Current revision: Published (05/13/2024)  
The Constellation design system library provides a comprehensive collection of UI components. The most common Case Constellation's configuration options. However, most clients have unique needs, with if these common Case management patterns. You can use Constellation DX components



PEGA GenAI Blueprint™ My Blueprint Dashboard

RETAIL BANKING • BP-1004

### Tech Entrepreneur Loan

Context Case Types Case Lifecycle Case Data Live Data Personas Summary

What Case Types do you want to automate? ⌵ ⬆ Create from BPMN ⬆ + Add a Case Type

- Loan Application** CASE TYPE  
This case type represents the initial application submission by a tech entrepreneur for a small business loan. It includes the collection of basic information about the applicant, such as personal details, business details, and loan requirements...
- Credit Assessment** CASE TYPE  
This case type represents the credit assessment process for a small business loan application. It involves evaluating the creditworthiness of the applicant by analyzing their credit history, financial statements, and other relevant information.
- Business Plan Review** CASE TYPE  
This case type represents the business plan review process for a small business loan application. It includes assessing the viability and potential of the tech entrepreneur's business plan, analyzing market conditions, competition, and growth opportunities.
- Fraud Escalation** CASE TYPE  
This case type is for escalating applications that have been flagged for potential fraud, ensuring that the customer receives a fair review and that the Bankley Loans is protected from potentially fraudulent applications.

⬆ Generate More

Back Preview my app Save and Close Next

### Components

extension to the Constellation design system's UI component library, Constellation DX provides specific UI components to an application that seamlessly integrate with View

built using React, which is an open source JavaScript library. In addition to understanding Constellation DX components also need to know how to call different Constellation APIs, such as Pega Core to integrate the custom components into Pega Platform™.

on creating Custom DX Components, see [Constellation DX Components](#).

### Custom DX components

enables developers to customize Constellation applications, but this customization comes at a cost of a paradigm of configuration over customization. Building custom components has the

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